



WISCONSIN

DEPARTMENT OF WORKFORCE DEVELOPMENT

Division of Economic Support

Bureau of Work Support Programs

**TO: Economic Support Supervisors
Economic Support Lead Workers
Training Staff
Child Care Coordinators
W-2 Agencies**

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Non W-2 ☐ **W-2** ☒ **CC** ☐

PRIORITY: High

SUBJECT: CONFERENCE ON PERSONAL FINANCE

PURPOSE

This memo provides information about a special conference on personal finance.

BACKGROUND

The Department of Workforce Development, the Department of Financial Institutions and the Urban Economic Development Association have teamed up with other community businesses and social services agencies to offer "You and Your Money: A Conference on Personal Finance".

The Conference is targeted toward low-income families and will offer education and training about credit with speakers from Consumer Credit Counseling Service, Trans Union Credit Reporting Bureau, the IRS Taxpayer Education Office and a W-2 "graduate" who has successfully entered the mainstream economy. There will also be education and training about why money management is important and what programs and services are available to low-income families who want to start a savings/investing program.

The Money Conference also offers education and training for children and young adults ages 6 to 18. Children and young adults can learn what investment and financial education programs are available in the community. Richard Anderson, a 7 year old investor who at age 5 was the youngest person to ring the bell at the NYSE, will talk to both youth groups about how he got started investing and will talk about his stock portfolio. There will also be investment education for intermediate investors.

The conference cost is \$15 for adults and \$5 per child and includes a continental breakfast, lunch and all program materials.

The Money Conference is an allowable W-2 education and training activity. W-2 agencies are asked to encourage W-2 participants and staff to attend this conference.

If the W-2 agency requires a participant to attend, the following must occur:

1. Necessary supportive services (transportation, child care, payment for registration) need to be provided.
2. The employment plan should reflect the activity.
3. Hours must be considered in the 10-12 hours per week education and training limit.

Registration materials are available to W-2 agencies to distribute to their clients and staff; see the announcement (next page) for a resource.

W-2 supportive services should be used to pay registrations for W-2 clients and to provide transportation and child care.

You and Your Money: A Conference on Personal Finance

Saturday, April 29, 2000

Italian Community Center, 631 E. Chicago Street, Milwaukee, WI

SPONSORED BY THE DEPARTMENT OF FINANCIAL INSTITUTIONS
THE DEPARTMENT OF WORKFORCE DEVELOPMENT
WHEDA
URBAN ECONOMIC DEVELOPMENT ASSOCIATION
FAMILY SERVICE
CENTER FOR TEACHING ENTREPRENEURSHIP AND OTHERS

Pick from sessions targeted to fit your age and interests:

- Youth (Ages 6-11)
- Young Adults (Ages 12-18)
- Adult Sessions for beginners and more experienced investors:

One low price - \$15/Adult and \$5 for 18 years and under - includes continental breakfast, lunch, and all sessions!

Space limited!

Register Early!

KEYNOTE SPEAKERS INCLUDE:

MARY GOTCHALL--Co-Author "IT'S ABOUT THE MONEY"

ELLIS TRAUB, NAIC Computer Group Director and Creator of the Investor's Toolkit

DELORIS SIMS--Legacy Bank

RICHARD ANDERSON JR--At Age 6, The Youngest Person To Ring The Opening Bell At The NYSE

LEARN HOW TO:

- ESCAPE THE CREDIT CRUNCH
- PAY YOUR SELF FIRST
- GET STARTED INVESTING--EVEN IF YOU DON'T HAVE A LOT OF MONEY
 - CREATE AND RUN INVESTMENT CLUBS
 - USE SOFTWARE FOR INVESTMENT ANALYSIS

BRING THE ENTIRE FAMILY

KIDS FROM AGE 6 TO 11--ECONOMICS FOR KIDS

YOUNG ADULTS FROM AGE 12 TO 18--HAVE FUN WITH FINANCE
AND MUCH MUCH MUCH MORE!!!!

IF YOU WOULD LIKE TO BE SENT REGISTRATION MATERIALS, PLEASE CONTACT
THE URBAN ECONOMIC DEVELOPMENT ASSOCIATION AT (414) 225-0550!

Space limited!

Register Early!